Inventory Instructions

Fort Collins Public Library
Revised 02/03/2007

The major parts of doing inventory are –

- Create a good plan
- Scan barcodes
- Find exceptions
- Identify what is missing

There are many details but these are the major steps. It's important to stay organized and understand the difference between exception items and missing items. As you go through the process again and again, it will all make sense!

This document covers everything except creating the good plan.

Scan barcodes

Start your inventory with a good plan. Once you have your plan, start scanning sections, one location code at a time.

Must have

- Portable barcode scanner
- Good batteries

1. Scan barcodes into scanner. We use a Percon portable barcode scanner we purchased from III. (See User Manual Page # 102530)
2. Each scanning session must be from a single location code. While it's possible to combine location codes in a single session, we don't recommend it. These instructions only cover single location code/session.

Download barcodes from Percon to PC

This section describes how to transfer your scanned barcodes from the Percon to your PC.

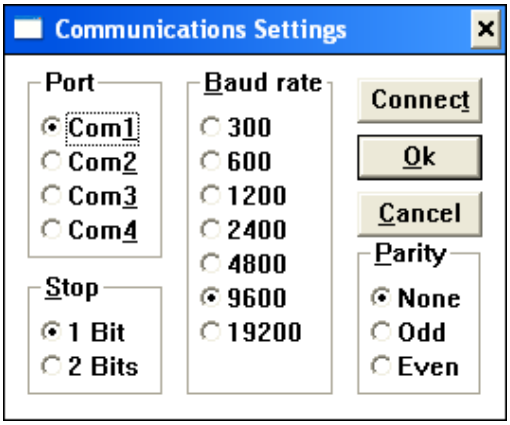
Must have

- Percon portable barcode scanner
- Serial cable Percon ←→ PC
- Portable File Transfer software loaded on PC (from III)
- Inventory log file (see below)

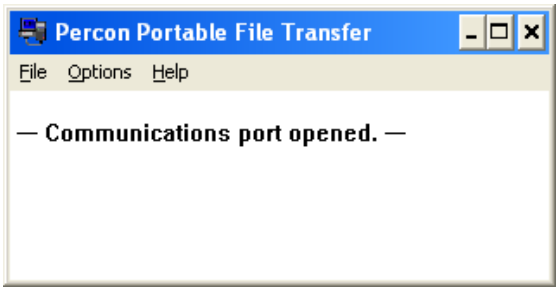
If you have a different barcode scanner you will have different file transfer software. That's OK. Adapt these instructions for what you have.

1. Plug the Percon into the black serial cable connected to the PC.
2. Open **Portable File Transfer** software. We have an icon on the desktop.

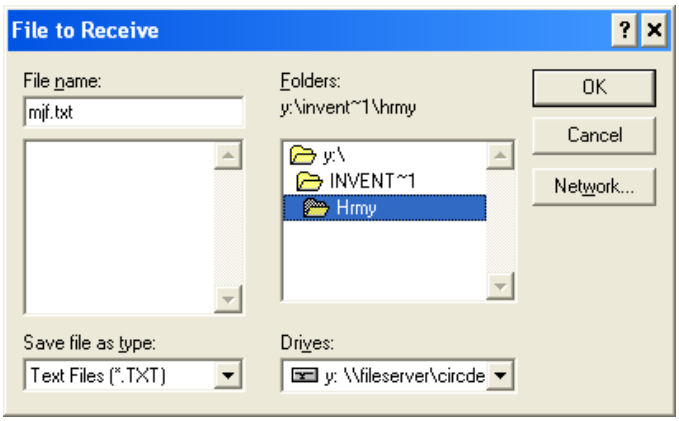
Software settings – the very first time you use the software, check the settings and make sure they are correct for your setup. Go to **Options → Settings…** Our serial cable is plugged into COM1 so our settings look like this:



3. Go to **Options → Connect.** The message "--- Communications port opened. ---" should appear immediately.

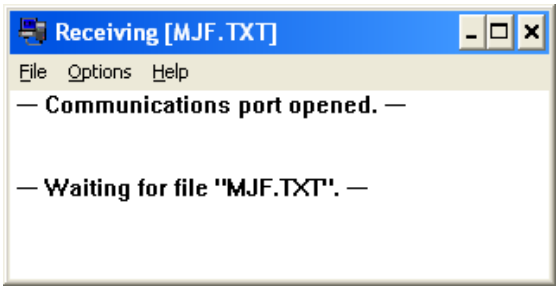


4. Go to **File → Receive.**
5. Navigate to the folder you wish to download the file to (we use **CircDesk on Fileserver > Inventory > Main or Hrmy**). Use the *Folders* and *Drives* section on the right side of the window to navigate.



6. Once you are pointing to the correct folder, enter the filename for the inventory section you are downloading. The filename should always be the location code you scanned (ex. "**mjf.txt**" for Main Juvenile Fiction).
7. If you are downloading part of a large collection (Adult Nonfiction, for example), you should number each file for that section (ex. ***mx1.txt***, ***mx2.txt***, ***mx3.txt***, etc).

8. Click **OK**. The message “--- Waiting for file "<filename>.TXT". ---” should appear immediately.

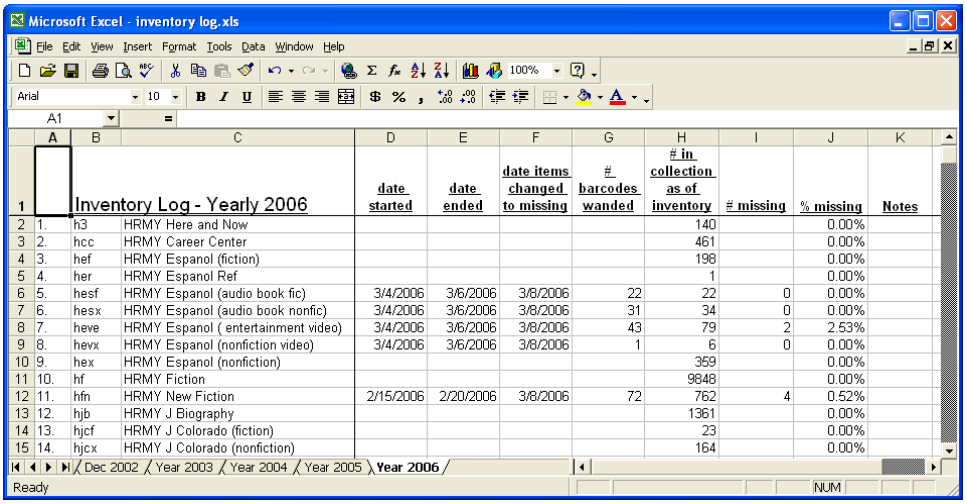


9. Turn on the Percon, if it is not already on, by pressing the **green I/O button**.
10. Press **F4** several times until you see the option: *F3-SEND FILE*.
11. Press **F3** to send the file.
12. Press **F1** to select *Send to PAC*.
13. Press **F1** to select *PC Download*.
14. On the PC, the message “--- File "<filename>.TXT" received”. ---” should eventually appear. Depending on the size of the file you are downloading, this could take a couple seconds to a couple minutes.
15. If there are any problems, do not erase the file when prompted. You’ll need to start over.
16. If there were no problems, press **F1** on the Percon twice to erase the file. (This is permanent! The file cannot be retrieved once you delete it!)
17. Press **F4** to end.
18. Turn off the Percon by pressing the **green I/O button** again.

19. If you have more Percons to download, repeat above steps starting with Step 4.
20. When you are finished downloading, go to **File → Exit** to close the Portable File Transfer program.

21. Enter the inventory start and end date for the collection in the Inventory Log located at **\\Fileserver\Circdesk\Inventory\Inventory_log.xls** (some PCs will have a desktop shortcut to this location).
    My Computer → CircDesk on Fileserver → Click on Inventory.

    Our Inventory Log file looks like this:



	A	B	C	D	E	F	G	H	I	J	K
1		Inventory Log - Yearly 2006		date started	date ended	date items changed to missing	# barcodes wanded	# in collection as of inventory	# missing	% missing	Notes
2	1.	h3	HRMY Here and Now					140		0.00%	
3	2.	hcc	HRMY Career Center					461		0.00%	
4	3.	hef	HRMY Espanol (fiction)					198		0.00%	
5	4.	her	HRMY Espanol Ref					1		0.00%	
6	5.	hesf	HRMY Espanol (audio book fic)	3/4/2006	3/6/2006	3/8/2006	22	22	0	0.00%	
7	6.	hesx	HRMY Espanol (audio book nonfic)	3/4/2006	3/6/2006	3/8/2006	31	34	0	0.00%	
8	7.	heve	HRMY Espanol (entertainment video)	3/4/2006	3/6/2006	3/8/2006	43	79	2	2.53%	
9	8.	hevx	HRMY Espanol (nonfiction video)	3/4/2006	3/6/2006	3/8/2006	1	6	0	0.00%	
10	9.	hex	HRMY Espanol (nonfiction)					359		0.00%	
11	10.	hf	HRMY Fiction					9848		0.00%	
12	11.	hfn	HRMY New Fiction	2/15/2006	2/20/2006	3/8/2006	72	762	4	0.52%	
13	12.	hjb	HRMY J Biography					1361		0.00%	
14	13.	hjcf	HRMY J Colorado (fiction)					23		0.00%	
15	14.	hjcx	HRMY J Colorado (nonfiction)					164		0.00%	

Upload File from PC to III server

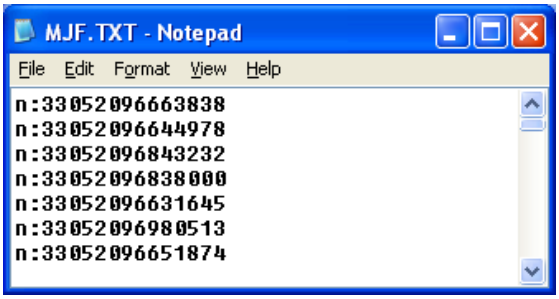
This section describes how to upload your file of scanned barcodes from your PC to the III server. You will create a review file of the barcodes which will serve as the basis for your Exceptions Report.

Must have

- Millennium Offline Circulation software loaded on PC – available from CSDirect
- Access to Dalva (this is our character-based INNOPAC)
- III's Inventory Control module (C-A-P from Main Menu)
- Authorizations to process PC transactions (see User Manual)

Prepare the files

1. From My Computer, open the folder which contains your downloaded files. We use **CircDesk on Fileserver > Inventory > Main or Hrmy**. Your files should look like this:



If you do not have files to combine, skip this step.

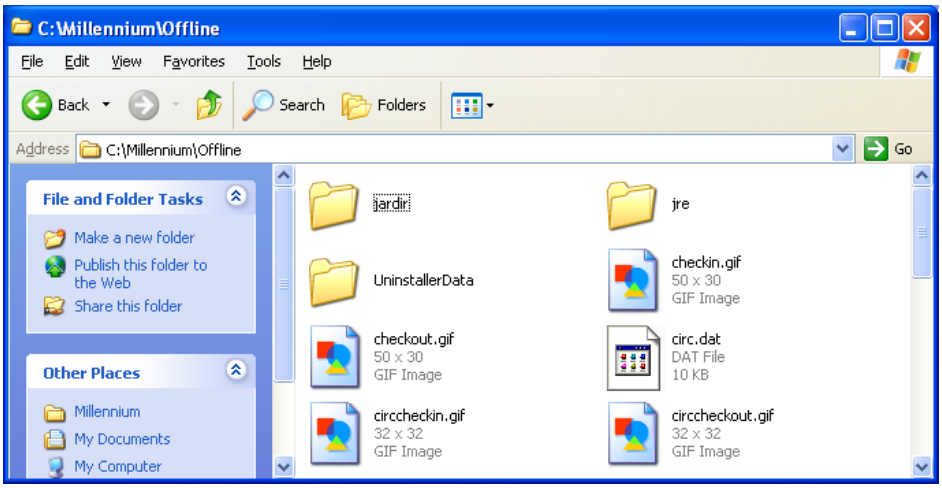
2. If you have downloaded multiple files for one location code (e.g. mx1.txt, mx2.txt, mx3.txt), you can consolidate the files into one .txt file before uploading.
   For example, use **Notepad** to copy all the barcodes from mx1.txt, mx2.txt, mx3.txt into a single file called mx.txt.
   Do not combine files from difference location codes.

   To combine file:
   - Open **Notepad** to open a new empty file.
   - Back at the **CircDesk on Fileserver > Inventory > Main or Hrmy** folder window, double click to open the first file, e.g. mx1.txt. The file will open in Notepad.
   - Choose *Edit → Select All*, then *Edit → Copy*. (You can also right-click to see the same options.)
   - In the new file, choose *Edit → Paste*.
   - Repeat for each file in that collection.
   - Save the new combo file. Name it with the location code. (Make sure it is saved in **CircDesk on Fileserver > Inventory > Main or Hrmy**).

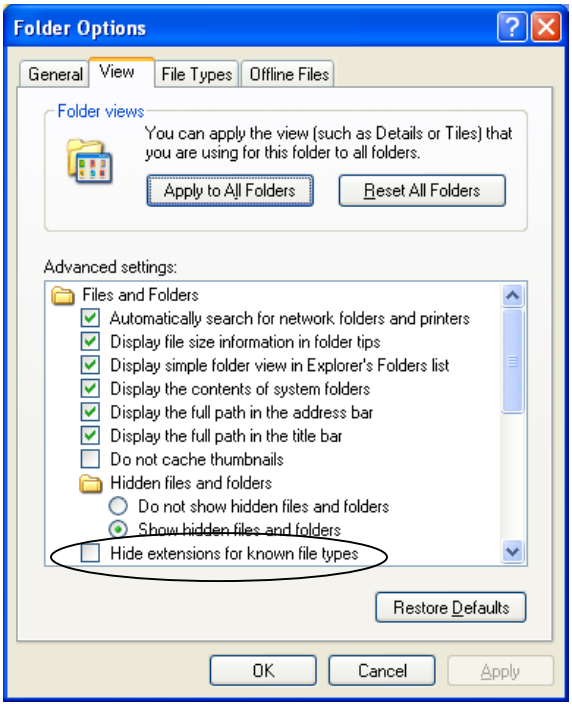
   Example:
   Mx1.txt →
   Mx2.txt → **mx.txt**
   Mx3.txt →

Move file to Offline Circ folder

3. From My Computer, open the Millennium Offline folder (**C:\Millennium\Offline**). (Click on Local Disk (C:) → then Millennium → then Offline)



4. Make sure My Computer is showing file extensions, .gif, .dat, etc. If you don't see the file extensions, do the following:
   - Go to *Tools* → *Folder Options*.
   - Go to the *View* tab (second tab).
   - In the *Advanced Settings* box, **uncheck** the *Hide extensions for known file types* option.
   - Click *OK*. *(You should only need to do this once – the setting stays the same after rebooting.)*

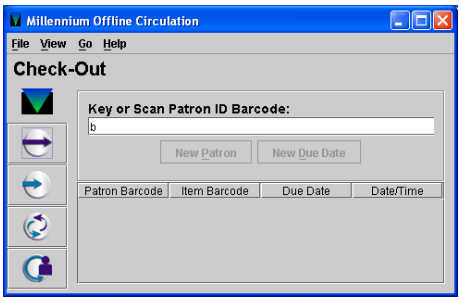

Folder Options
General View File Types Offline Files
Folder views
You can apply the view (such as Details or Tiles) that you are using for this folder to all folders.
Apply to All Folders
Reset All Folders
Advanced settings:
Files and Folders
Automatically search for network folders and printers
Display file size information in folder tips
Display simple folder view in Explorer's Folders list
Display the contents of system folders
Display the full path in the address bar
Display the full path in the title bar
Do not cache thumbnails
Hidden files and folders
Do not show hidden files and folders
Show hidden files and folders
Hide extensions for known file types
Restore Defaults
OK
Cancel
Apply

5. Copy inventory file from **CircDesk on Fileserver > Inventory > Main or Hrmy** to **c:\Millennium\Offline**.
   - In the **CircDesk on Fileserver > Inventory > Main or Hrmy** folder window, right click on the first file you wish to upload and choose *Copy*.
   - In the **Offline** folder window, go to *Edit* → *Paste*. (Or you can also right click on the white space in the folder and choose *Paste*.)

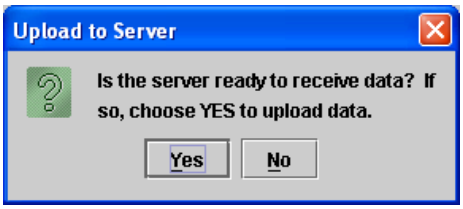
6. You need to rename your transferred file **circ.dat**:
   - If there is an old **circ.dat** file in the **Offline** folder, delete it.
   - Right click on the newly pasted file and choose **Rename**. Change the name to **circ.dat**. (That's the file you just deleted.) Click *Yes* to confirm the name change.

Upload file to III server

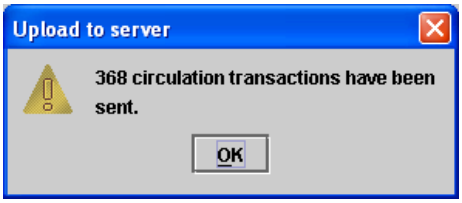
7. Start **Millennium Offline Circulation** program.



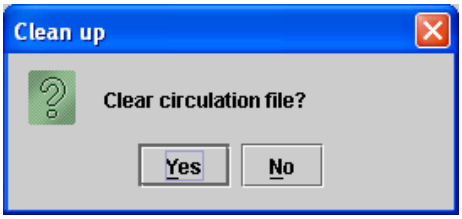
8. Go to *File* → *Upload circulation and patron data…*



9. Click **Yes** to upload the files and then **OK** to confirm. (Make a note of the number of items sent!)



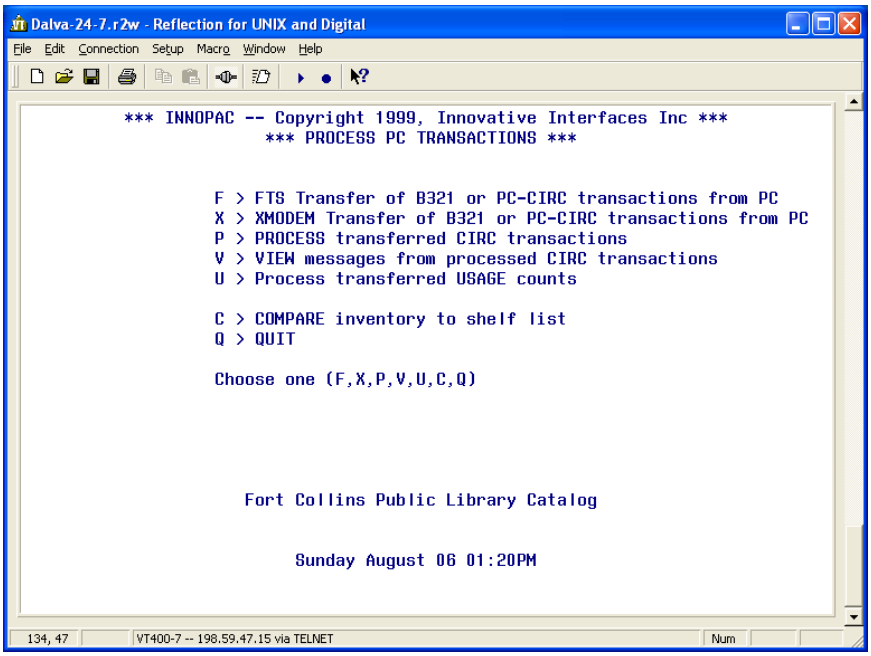
10. Click **Yes** to erase the circulation file then **OK** to finish.



11. Close ***Millennium Offline Circulation***, **File → Exit**.

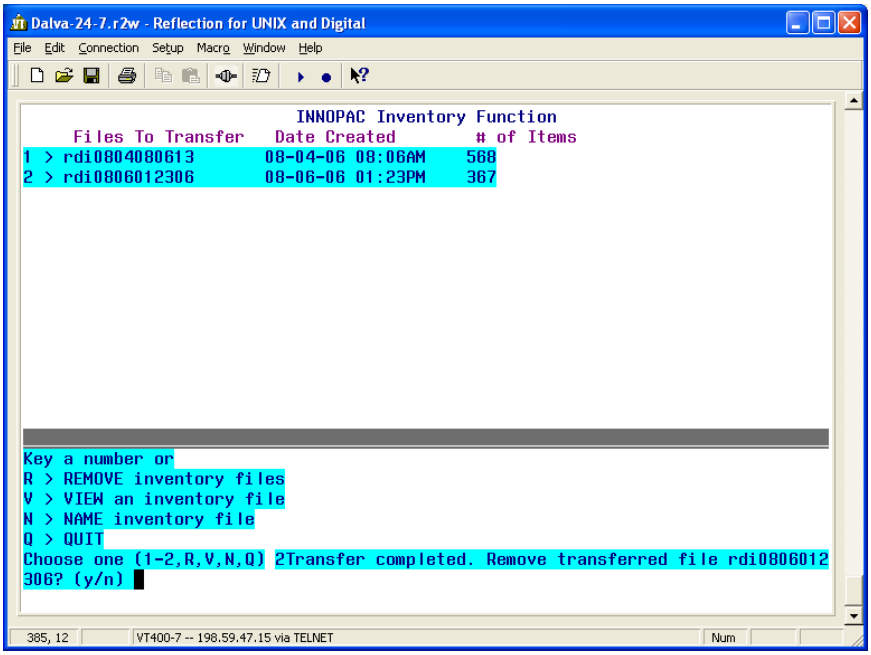
Copy file to review file

12. Open Dalva (character-based INNOPAC) and open III's Inventory control module.
    From **Main Menu**, go to
    C (*Circulation subsystem*)
    A (*Additional circulation functions*)
    P (*Process PC transactions*).
13. Enter your Millennium initials and password.


Dalva-24-7.r2w - Reflection for UNIX and Digital
File Edit Connection Setup Macro Window Help
*** INNOPAC -- Copyright 1999, Innovative Interfaces Inc ***
*** PROCESS PC TRANSACTIONS ***
F > FTS Transfer of B321 or PC-CIRC transactions from PC
X > XMODEM Transfer of B321 or PC-CIRC transactions from PC
P > PROCESS transferred CIRC transactions
V > VIEW messages from processed CIRC transactions
U > Process transferred USAGE counts
C > COMPARE inventory to shelf list
Q > QUIT
Choose one (F,X,P,V,U,C,Q)
Fort Collins Public Library Catalog
Sunday August 06 01:20PM
134, 47
VT400-7 -- 198.59.47.15 via TELNET
Num

14. Go to **C** (*Compare inventory to shelf list*)
    T (*Transfer file of barcodes to Review file*).
15. **Choose an empty file** to load the text file into. Make sure the empty files "Max Records" is big enough to fit all the barcodes from the text file you are transferring or you will get an error.
16. **Enter the review file name** in the following format: <initials> <date> <location code> (ex. ***cg 9-19-05 mjf***).
17. **Choose the correct text file** to transfer (check the number of items for a clue). The filename will be something like rdi0806111913 (the number represents the month-day-time).

18. If prompted, choose to remove the old text file. If asked if you want to view barcodes that did not transfer, choose ***No***. (If you want to view the problem barcodes, choose *Yes*. You can print to *Email Printer* and enter your e-mail address when prompted.) But, we don't worry about barcodes that don't transfer.


Dalva-24-7.r2w - Reflection for UNIX and Digital
File Edit Connection Setup Macro Window Help
INNOPAC Inventory Function
Files To Transfer Date Created # of Items
1 > rdi0804080613 08-04-06 08:06AM 568
2 > rdi0806012306 08-06-06 01:23PM 367
Key a number or
R > REMOVE inventory files
V > VIEW an inventory file
N > NAME inventory file
Q > QUIT
Choose one (1-2,R,V,N,Q) 2Transfer completed. Remove transferred file rdi0806012306? (y/n)
385, 12
VT400-7 -- 198.59.47.15 via TELNET
Num

19. Repeat steps 5 - 18 for each file you need to upload.
20. Quit out of Dalva.

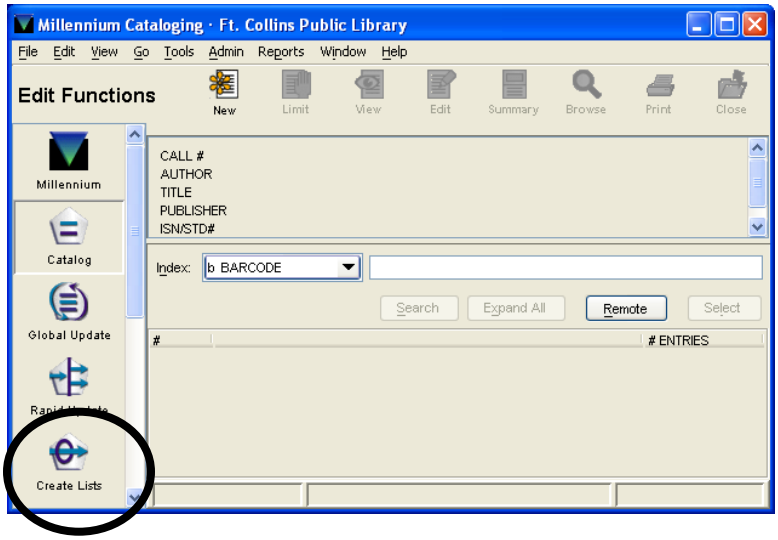
Find the Exceptions

In this section you are looking for all the items you scanned that don't belong in the section you scanned or have some sort of problem with the record – wrong location code, wrong status, etc. You will create a review file of these "exceptions". Note: This is not a list of missing items. You will do that later. This is only a list of items that don't belong or have a problem.

Must have

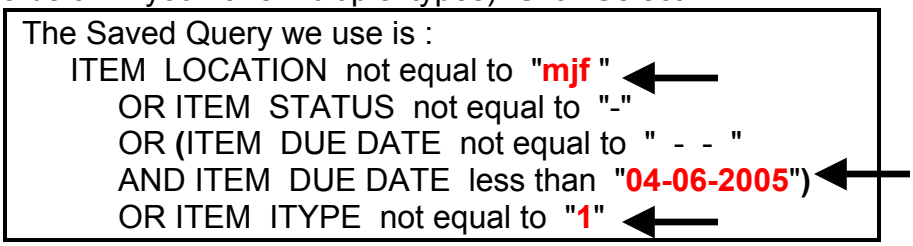
- Access to Millennium Create Lists
- Authorizations to use Create Lists

1. Open **MilCirc**, in **Admin → Set Initials**, set your initials and password, and go to the **Create Lists** mode.



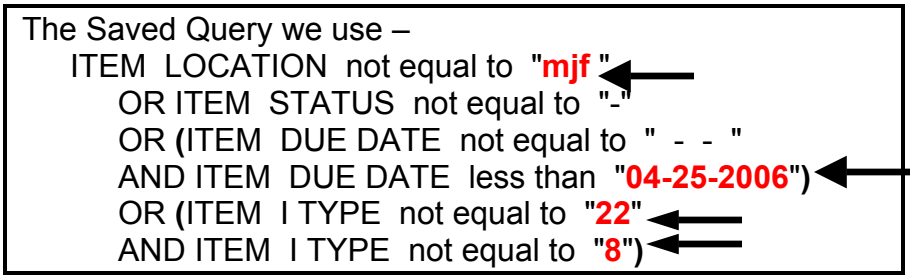
2. Select an empty list and choose **Search Records**.
3. Enter the following information:
   - Review File Name: *<initials> <date> <collection> exceptions* (ex. ***cg 9-19-05 mjf exceptions***)
   - Store Record Type: **Item**
   - Range to **Review**
   - Review File: Use the drop-down menu to **find and select the review file** you created above. (ex. ***cg 9-19-05 mjf***)

4. Choose *Retrieve Saved Query* and select "*mjm - inventory exceptions*" (or see Step 5 below if you have multiple itypes). Click Select.


The Saved Query we use is :
ITEM LOCATION not equal to "mjf "
OR ITEM STATUS not equal to "-"
OR (ITEM DUE DATE not equal to " - - "
AND ITEM DUE DATE less than "04-06-2005")
OR ITEM ITYPE not equal to "1"

- ITEM LOCATION - **change** Value A to match the location code of the file you are working with (for example, ***mjf*** for Main Juvenile Fiction).
- ITEM STATUS – leave status as "-"
  If you are working with a reference collection, change status to "o" for LIB USE ONLY.
- ITEM DUE DATE – leave 1st date as " - - "
  change 2nd Value A to match the date that the inventory of the collection began (for example, ***04-25-2006***). Check your Inventory Log file if you aren't sure.
- ITEM ITYPE - **change** to match the item type of the collection you are working with (for example, IYTPE=1 ***21 Day Book*** for Main Juvenile Fiction). ***Double-click on value to open list of choices.***
- NOTE: Make sure the two DUE DATE lines are "grouped" with parentheses. **This is very important**.

5. If you are working with a collection that has **multiple item types** (such as entertainment video which includes both videos and DVDs), go back to Step 4 and instead select "*mjm – inventory exceptions – multiple i-types*."
   The Saved Query we use is similar to above but with multiple ITYPEs. The ITYPEs must be grouped with parentheses.


The Saved Query we use –
ITEM LOCATION not equal to "mjf "
OR ITEM STATUS not equal to "-"
OR (ITEM DUE DATE not equal to " - - "
AND ITEM DUE DATE less than "04-25-2006")
OR (ITEM I TYPE not equal to "22"
AND ITEM I TYPE not equal to "8")

   NOTE: For libraries with many more ITYPEs, it might not be practical to use the ITYPE in the query. You can delete the ITYPE line of the query.

6. Choose ***Search*** and click ***Yes*** to start searching.
7. Repeat this procedure from step 2 for each file, using a different empty list for each location code.

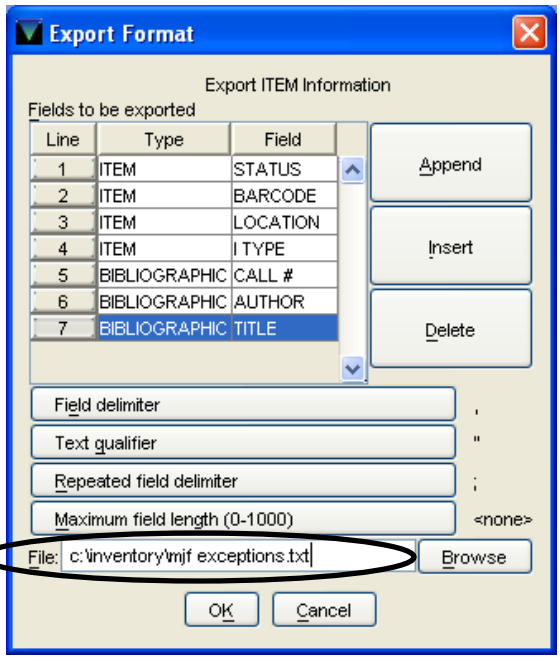
Create the Exceptions Report

This section describes how to create the exceptions report for printing. This report lists all the items scanned that do not belong in the scanned section or have a record problem. All items on this report need to be found and fixed.

Must have

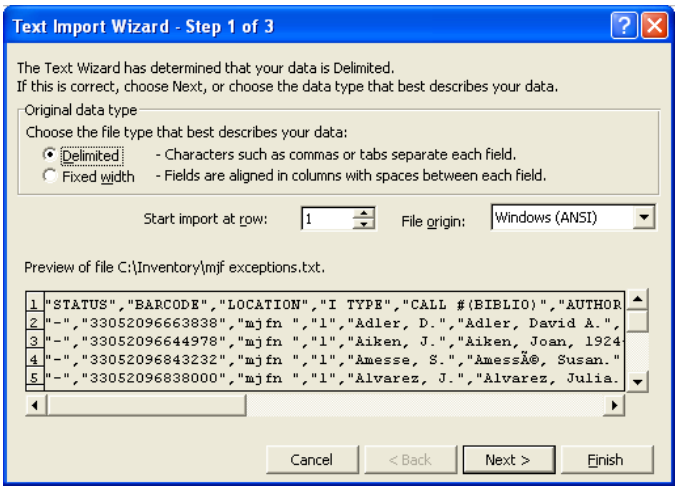
- Millennium Create Lists
- Excel
- Printer

1. In Millennium Create Lists, **highlight** your review file of exceptions (ex. ***cg 9-19-05 exceptions***) and click **Export Records**.
2. Choose the following fields to be exported (in this exact order). *Append* or *insert* extra fields as needed:
   - Item (i) – Status (88) required field
   - Item (i) – Barcode (b) required field
   - Item (i) – Location (79) required field
   - Item (i) – I Type (61) optional
   - Bibliographic (b) - Call Number (c) required field
   - Bibliographic (b) – Author (a) optional
   - Bibliographic (b) – Title (t) required field
3. Enter the path and filename to save to (**c:\inventory\mjf exceptions.txt**, for example). Click *OK* to start exporting.

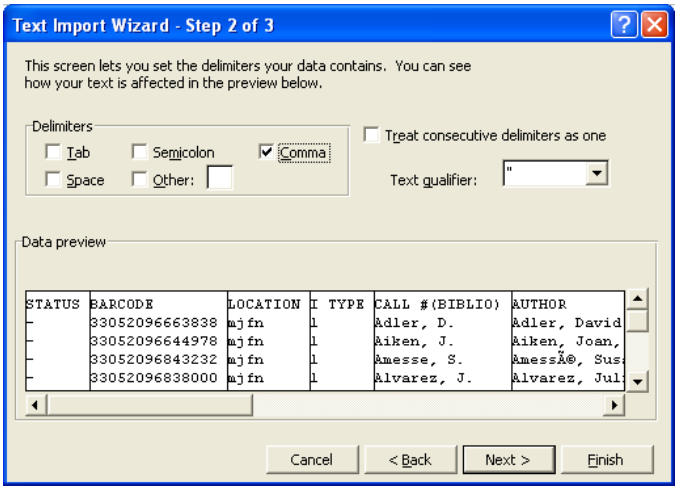


4. Repeat for each exceptions review file.
5. Open Excel and open the exported text file.
   Ex. File → Open → CircDesk → Inventory → Main
   Choose "All files" at bottom.
   Double-click on file wanted.

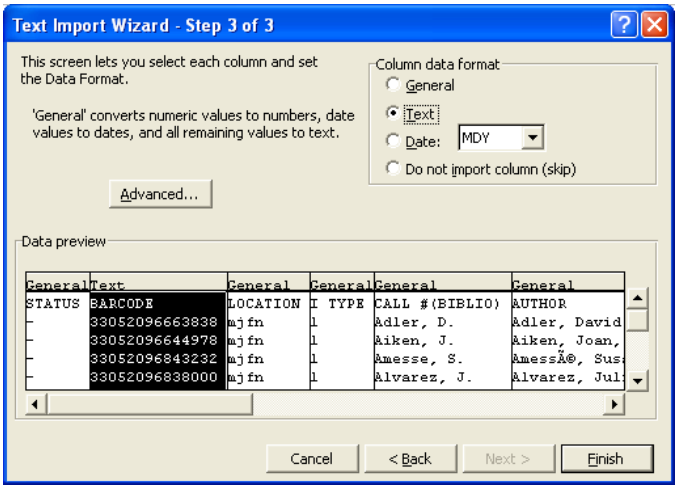
6. In the first screen of the *Text Import Wizard*, choose *Delimited* and click *Next*.


Text Import Wizard - Step 1 of 3
The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.
Original data type
Choose the file type that best describes your data:
Delimited - Characters such as commas or tabs separate each field.
Fixed width - Fields are aligned in columns with spaces between each field.
Start import at row: 1
File origin: Windows (ANSI)
Preview of file C:\Inventory\mjf exceptions.txt.
1 "STATUS","BARCODE","LOCATION","I TYPE","CALL #(BIBLIO)","AUTHOR
2 "-","33052096663838","mjfn ","1","Adler, D.","Adler, David A.",
3 "-","33052096644978","mjfn ","1","Aiken, J.","Aiken, Joan, 1924
4 "-","33052096843232","mjfn ","1","Amesse, S.","AmessÃ®, Susan."
5 "-","33052096838000","mjfn ","1","Alvarez, J.","Alvarez, Julia.
Cancel
< Back
Next >
Finish

7. In the second screen, unselect *Tab* (if necessary) and select *Comma*. Click *Next*.


Text Import Wizard - Step 2 of 3
This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.
Delimiters
Tab
Semicolon
Comma
Space
Other:
Treat consecutive delimiters as one
Text qualifier: "
Data preview
STATUS BARCODE LOCATION I TYPE CALL #(BIBLIO) AUTHOR
- 33052096663838 mjfn 1 Adler, D. Adler, David
- 33052096644978 mjfn 1 Aiken, J. Aiken, Joan,
- 33052096843232 mjfn 1 Amesse, S. AmessÃ®, Sus
- 33052096838000 mjfn 1 Alvarez, J. Alvarez, Jul
Cancel
< Back
Next >
Finish

8. In the third screen, highlight the second column (barcode) and select *Text*. Click *Finish*.

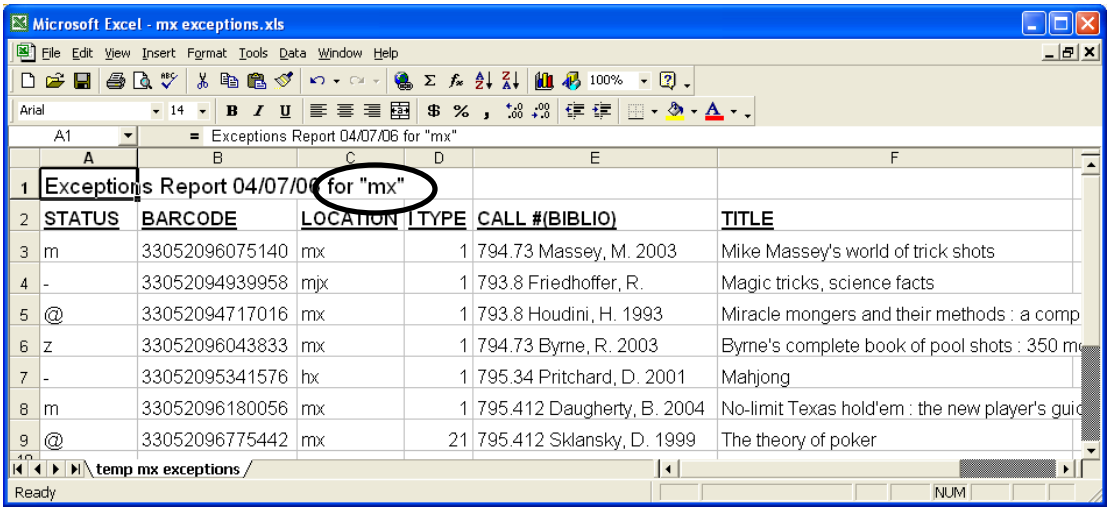

Text Import Wizard - Step 3 of 3
This screen lets you select each column and set the Data Format.
'General' converts numeric values to numbers, date values to dates, and all remaining values to text.
Advanced...
Column data format
General
Text
Date: MDY
Do not import column (skip)
Data preview
General Text General General General General
STATUS BARCODE LOCATION I TYPE CALL #(BIBLIO) AUTHOR
- 33052096663838 mjfn 1 Adler, D. Adler, David
- 33052096644978 mjfn 1 Aiken, J. Aiken, Joan,
- 33052096843232 mjfn 1 Amesse, S. AmessÃ®, Sus
- 33052096838000 mjfn 1 Alvarez, J. Alvarez, Jul
Cancel
< Back
Next >
Finish

9. Repeat for each exported text file.

10. Format the exceptions report for printing. (You can create your own report style by formatting the report to your liking.)

    To print the report, **Highlight** what you want to print.
    - **File → Print Area → Set Print Area.**
    - **File → Page Setup**
        - **Page** tab **Landscape**
        - **Margins** tab Top, Left, Right, Bottom – **0.5**, Header, Footer – **0.0**
        - **Sheet** tab Print **Gridlines**
        - **OK**
    - **File → Print Review**
        - Click **Margins** to adjust column widths
        - **Print**
        - **OK**

    Example of report:


Microsoft Excel - mx exceptions.xls
File Edit View Insert Format Tools Data Window Help
A1 = Exceptions Report 04/07/06 for "mx"
Exceptions Report 04/07/06 for "mx"
STATUS BARCODE LOCATION TYPE CALL #(BIBLIO) TITLE
m 33052096075140 mx 1 794.73 Massey, M. 2003 Mike Massey's world of trick shots
- 33052094939958 mjx 1 793.8 Friedhoffer, R. Magic tricks, science facts
@ 33052094717016 mx 1 793.8 Houdini, H. 1993 Miracle mongers and their methods : a comp
z 33052096043833 mx 1 794.73 Byrne, R. 2003 Byrne's complete book of pool shots : 350 m
- 33052095341576 hx 1 795.34 Pritchard, D. 2001 Mahjong
m 33052096180056 mx 1 795.412 Daugherty, B. 2004 No-limit Texas hold'em : the new player's guid
@ 33052096775442 mx 21 795.412 Sklansky, D. 1999 The theory of poker
temp mx exceptions
Ready
NUM

11. Repeat for each exceptions report.
12. If desired, copy (cut and paste) each report into a new consolidated Excel spreadsheet. Be sure to label each set of exceptions so you know which exception items are for which location code.
13. **Save** the file as an Excel spreadsheet, choose a .xls type. Use a title like "***Exceptions for Main Juvenile Fiction 4-5-06***" and **print**.
14. **Resolve items on the Exceptions report.**
    NOTE: It is very important to find and resolve these exceptions. You should be able to locate these on your shelves in the scanned area. You can go ahead and change the inventory date (see below) before resolving these exceptions. However, **you MUST resolve these exceptions before creating your Missing Inventory report**.
15. If you are satisfied with your exceptions report, go to MilCirc, Create Lists and "Empty" your exceptions lists. **Do not delete your original lists yet.**
    First, you must update the INVDA field. See next page.

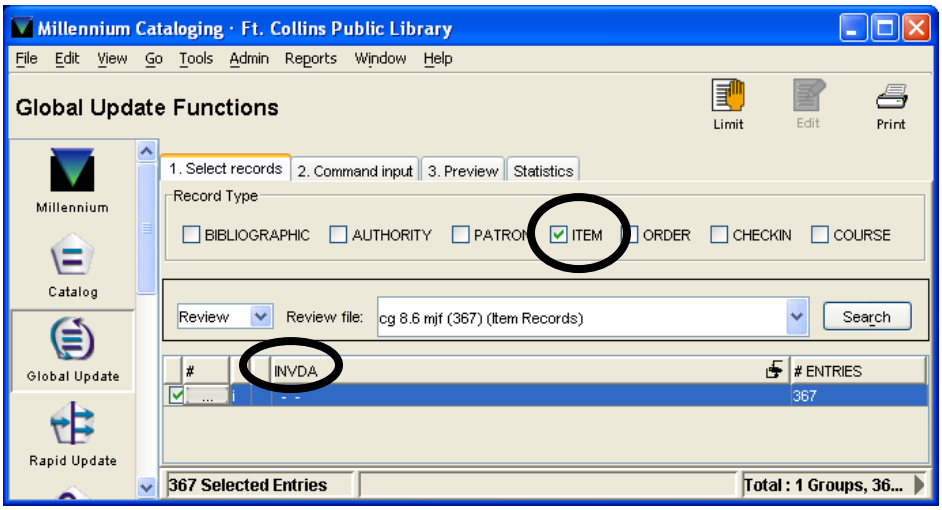
Update the Inventory Date Field

This sections describes how to change the inventory date field (INVDA) for all items you scanned. This step must be done before creating your Missing Inventory report.

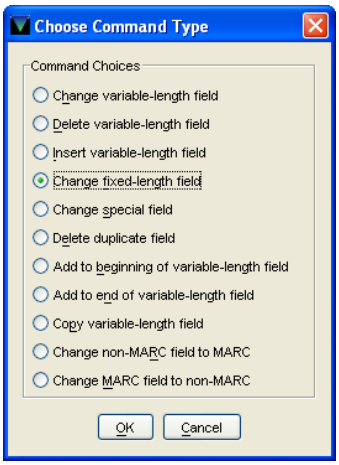
Must have

- Millennium Cataloging
- Authorizations for Global Update

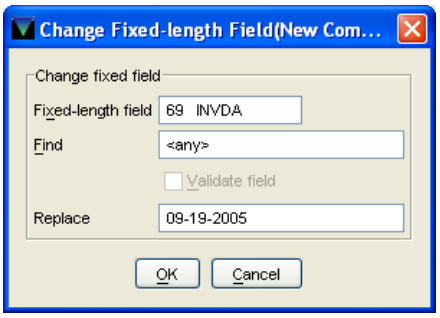
1. In **Millennium Cataloging**, go to **Global Update**. You will start out in the **Select Records** tab.
2. Change *Record Type* to **Item** (uncheck all other options).
3. Change *Index* to **Review** in drop-down menu.
4. In the *Review File* drop-down menu, choose the inventory review file of your scanned barcodes. (ex. ***cg 9-19-05 mjf***) Do **NOT** choose the exceptions file.
5. Go to **Tools menu → Toggle → ITEM Fixed-Length Fields → INVDA**.
   This is the inventory date field.
6. Click **Search** and wait for the process to finish.



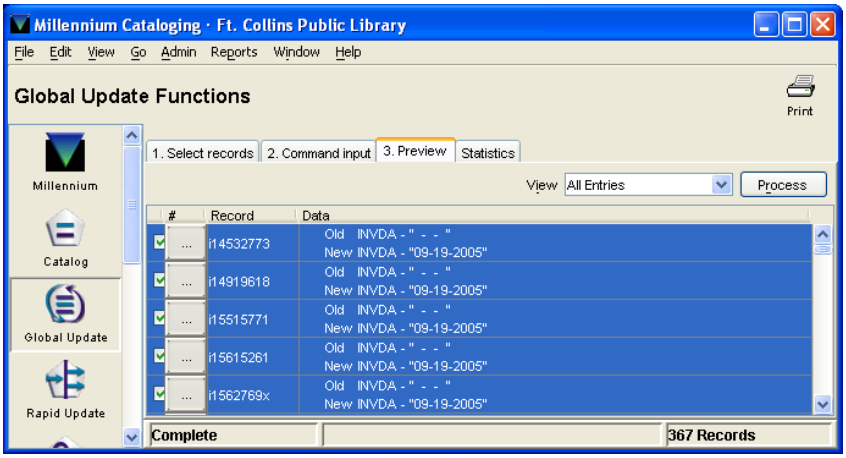
7. Make sure all item lines are **highlighted/selected** then click on the **Command Input** tab.
8. In the window that pops up, select **Change Fixed Length Field** and click **OK**.



9. In the window that pops up, change the following:
    - Change *Fixed Length Field* to **INVDA** (you can double click on the field to bring up a clickable menu).
    - Type in **"<any>"** under *Find*.
    - Leave *Validate Field* **unchecked**.
    - Under *Replace*, enter the inventory start date in this format: MM-DD-YYYY (ex. ***09-19-2005***). Click **OK**.



10. Go to *Preview* tab.



11. If it looks correct, click **Process**. The update may take between several seconds to a few minutes depending on the size of the file.
12. Repeat Steps 4 - 11 for each inventory review file of scanned barcodes.
13. Once the INVDA has been updated for all collections and all the exceptions reports have been printed, all inventory (original and exceptions) review files can be removed from Create Lists.
    - Return to the *Create Lists* mode.
    - Highlight the file you wish to delete.
    - Click on the *Empty* button at the top.
    - Choose *Yes* when asked if you are sure you want to delete the file.
14. Repeat for each collection or exceptions file. **Be careful not to delete someone else's review file!**

Identify what is Missing

This section describes how to identify all items considered missing after inventory and how to change them to "missing" status. What you do after that depends on what works best for your library. We run a biweekly search report that includes items on claimed returned, missing, and in transit status. The items marked missing from inventory naturally appear on that report. Eventually, we delete anything that has been on missing status for 6 months or more. These instructions only describe how to identify missing items after inventory and to change their status to Missing.

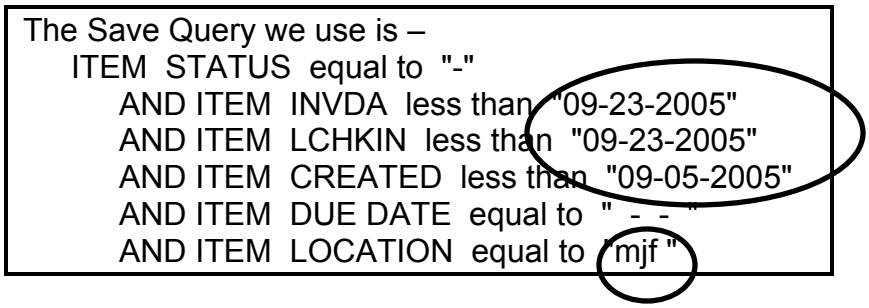
At our library, Systems staff runs this report and uses Global Update to change status to Missing.

Must have

- Scanned an entire location code
- Resolved all exceptions in the location code
- Updated INVDA for all scanned items in the location code
- Millennium Cataloging
- Authorizations for Global Update

1. In Millennium Cataloging, go to Create Lists.
2. Select an empty file and choose Search Records.
3. Enter the review file name in this format: "<initials> <date> missing items".
   e.g. "***cg 8.6.06 missing items***"

4. Enter the Store Record Type as **Item**.
5. Select Retrieve Saved Query and choose "mjm inventory missing items."


The Save Query we use is –
ITEM STATUS equal to "-"
AND ITEM INVDA less than "09-23-2005"
AND ITEM LCHKIN less than "09-23-2005"
AND ITEM CREATED less than "09-05-2005"
AND ITEM DUE DATE equal to " - - "
AND ITEM LOCATION equal to "mjf "

6. Adjust the fields as follows:
   INVDA < (inventory start date minus 3 days)
   LCKIN < (inventory start date minus 3 days)
   CREATED < (inventory start date minus 3 weeks)
   LOC = (location code of completed collection)

NOTE: Look in Inventory Log to get inventory start date.

7. If you have more than one collection code to process, choose “mjm inventory missing items (multiple items)” instead. Use the extra “LOCATION” lines to enter the additional collection codes. Delete any extra lines.

The Saved Query is similar to above but can accommodate multiple location codes. **Location codes must be “grouped” with parentheses in a long “OR” statement.**

This is what we use –

```
ITEM  STATUS  equal to  "-"
        AND ITEM  INVDA  less than  "09-23-2005"
        AND ITEM  LCHKIN  less than  "09-23-2005"
        AND ITEM  CREATED  less than  "09-05-2005"
        AND ITEM  DUE DATE  equal to  "  -  -  "
        AND (ITEM  LOCATION  equal to  "mef  "
                OR ITEM  LOCATION  equal to  "mesf "
                OR ITEM  LOCATION  equal to  "mesx "
                OR ITEM  LOCATION  equal to  "meve "…)
```

8. If you are processing Reference materials where all items should be on status=o (LIB USE ONLY), change the first line of the query to ITEM STATUS equal to “o”.

9. When all collection codes are accounted for, click **Search** to start the search.

10. When the process is complete, take a look at the file. “Is it reasonable?” Sometimes I export the file to look at call# to make sure a huge section wasn’t missed. If so, I let Circ know which section they missed and they can inventory it. They inventory the missed section, run their exceptions report, resolve the exceptions and I update the INVDA field. I wait until they are completely finished and then I start the process over again to identify the missing items. I don’t want to change a bunch of items to missing status if it isn’t true! If the file looks reasonable, I proceed.

11. Use Millennium Statistics or character-based M – S – B
    - MANAGEMENT Information
    - Statistics
    - Boolean search – review file of missing items created in Step 9 above.

    Look for anything grossly wrong.

12. Enter the date and number of missing items in each collection code into the Inventory Log. The numbers are easy to see in the statistics in M-S-B or MilStats.

13. Go to Global Update.

14. Change Record Type to Item.

15. Change Index to Review.

16. Choose the missing items file under Review File.
    e.g. “cg 8.6.06 missing items”

17. Right click on the title bar (usually displays Barcode),
    go to Toggle → Item Fixed Length Fields → Status.

18. Click Search and wait for the process to finish.

19. Make sure all item lines are highlighted then go to Command Input tab.

20. Select Change Fixed Length Field and click OK.

21. Change parameters -
    Fixed Length Field to Status (you can also double click on the field to bring up a clickable menu).
    Enter "<any>" under Find.
    Under Replace, enter “m” for Missing status.

22. Go to Preview and select Process.

23. Sometimes Circulation wants a printed report of the Missing Items. If so, follow the instruction for exporting a report (under Creating Exceptions Report) and print the list to Circ printer.

    Most of the time Circ does not want a list of just these missing items. These will appear on our next biweekly Missing/In Transit/Claimed Returned report.